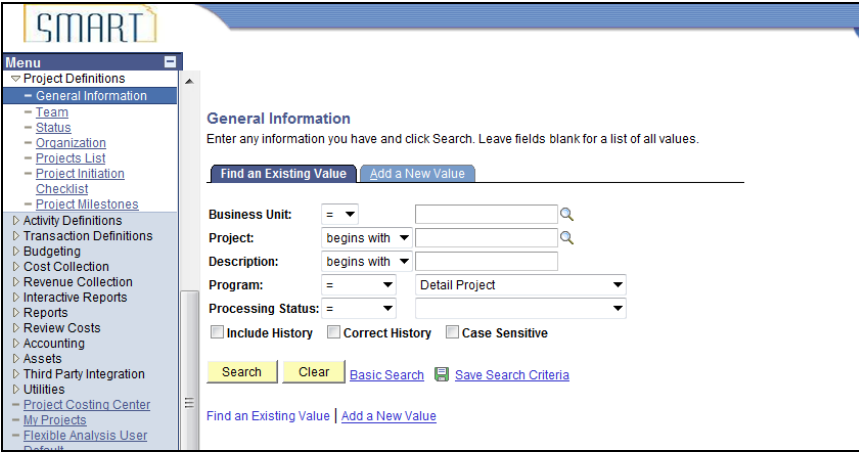
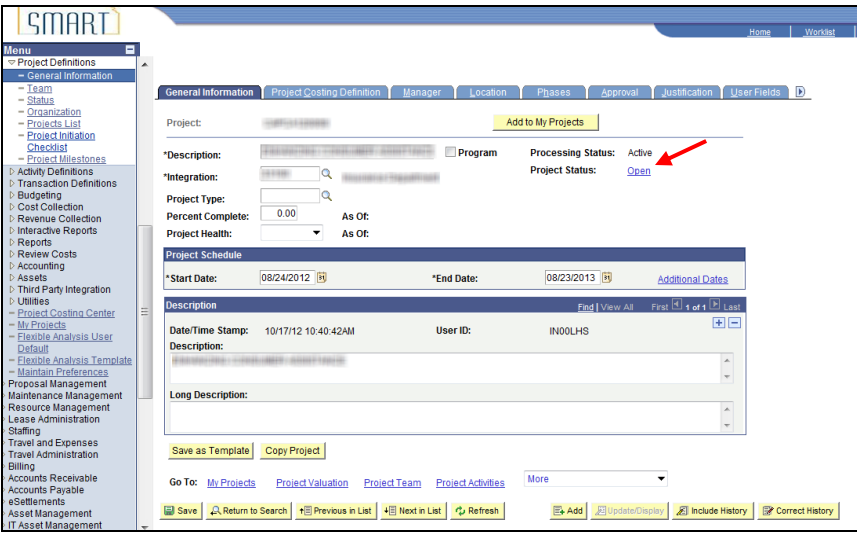
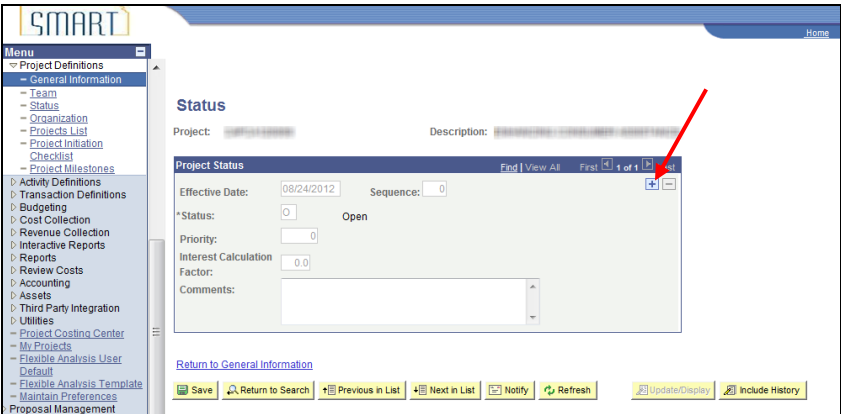
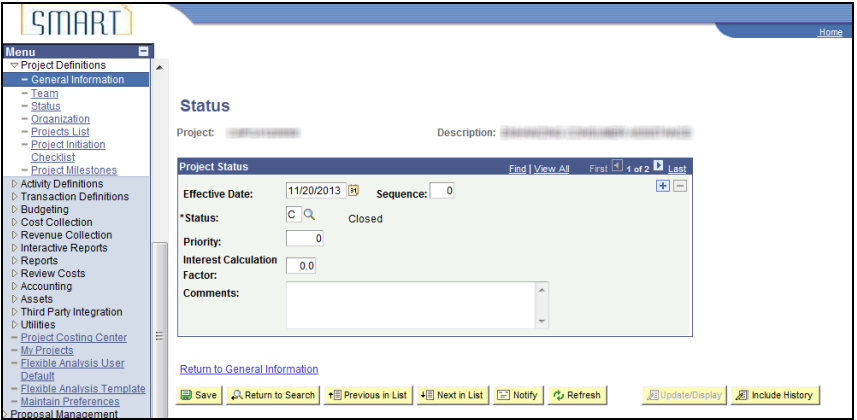


# State of Kansas

## Closing a Grant

*Statewide Management, Accounting and Reporting Tool*

<b>Date Created:</b>	11/20/2013
<b>Version:</b>	1.0
<b><u>Reason for Job aid:</u></b>	<p>This job aid describes how to close a grant in SMART. This is a multi-step process that involves coordinating inactivating data that resides in 3 separate modules in SMART: Project Costing, Customer Contracts and Grants. The process should occur in the following order:</p> <ol style="list-style-type: none"> <li>1. <b>Close the project and activities</b> in Project Costing to prevent any new transactions from being created.</li> <li>2. <b>Set the billing/revenue plans to “completed”</b> on the customer contract so no more reimbursement processing will occur. Make sure all billable transactions have been billed. Then, <b>set the contract status to “closed”</b> in the Customer Contracts module.</li> <li>3. <b>Close the award</b> in the Grants module.</li> </ol> <p>Users must have these 3 roles in order to complete the end-to-end process: <b>Agency Projects Manager</b>  <b>Agency Customer Contracts Manager</b>  <b>Agency Grants Manager</b></p>
<p>1. Close the Project and associated Activities.</p> <p>Navigate to: Project Costing  &gt; Project Definitions &gt;  General Information</p>	<p>Enter for the Project ID you wish to close in the “<b>Project</b>” field and click the <b>Search</b> button:</p> 

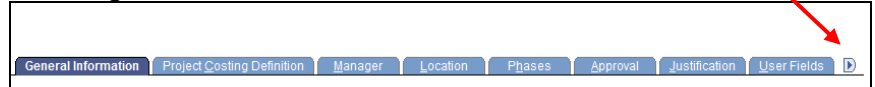
2.	<p>From the project “<b>General Information</b>” tab, click the “<b>Project Status</b>” link to access the <b>Status</b> page.</p>	 <p>The screenshot shows the SMART application interface. On the left is a menu with 'Project Status' under 'General Information'. The main area shows the 'Project Status' form with fields for Description, Integration, Project Type, Percent Complete, Project Health, Start Date, and End Date. A red arrow points to the 'Open' link next to the Project Status field.</p>
3.	<p>On the <b>Status</b> page, click the <b>+</b> button to add a new effective-dated status row.</p>	 <p>The screenshot shows the SMART application interface. On the left is a menu with 'Status' under 'General Information'. The main area shows the 'Status' form with fields for Project, Description, Effective Date, Sequence, Status, Priority, Interest Calculation, Factor, and Comments. A red arrow points to the '+' button in the top right corner of the 'Project Status' table.</p>
4.	<p>Enter the following field data, then click <b>Save</b>:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> = date of the project closure</li> <li>• <b>Status</b> = C (Closed)</li> </ul>	 <p>The screenshot shows the SMART application interface. On the left is a menu with 'Status' under 'General Information'. The main area shows the 'Status' form with fields for Project, Description, Effective Date, Sequence, Status, Priority, Interest Calculation, Factor, and Comments. The Effective Date is set to 11/20/2013 and the Status is set to Closed. A red arrow points to the 'Save' button at the bottom.</p>

5. Set the Billing and Revenue Plans to “Completed” on the Customer Contract.

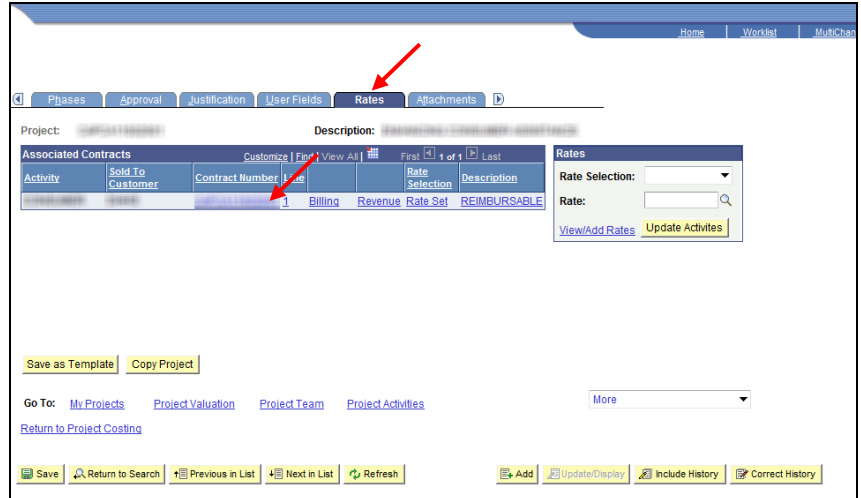
Navigate to: Customer Contracts > Create and Amend > General Information, and enter the contract number you wish to close in the “**Contract**” field and click the **Search** button

Or, as shown at right, use the arrow button to scroll to the right for additional project tabs and click on the “**Rates**” tab. Then, click the link to the contract number.

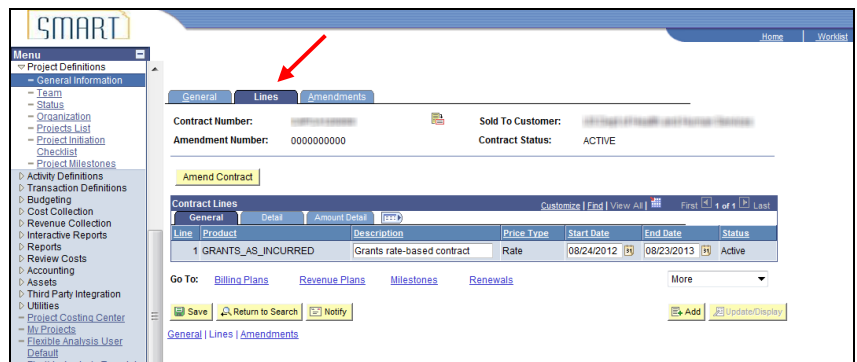
Scroll right:



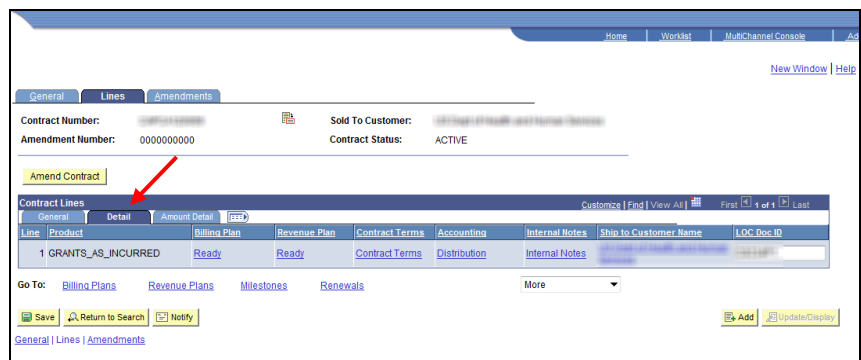
Rates tab:

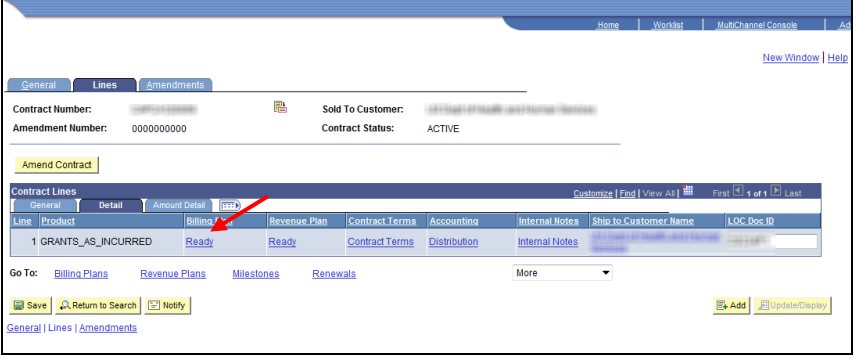
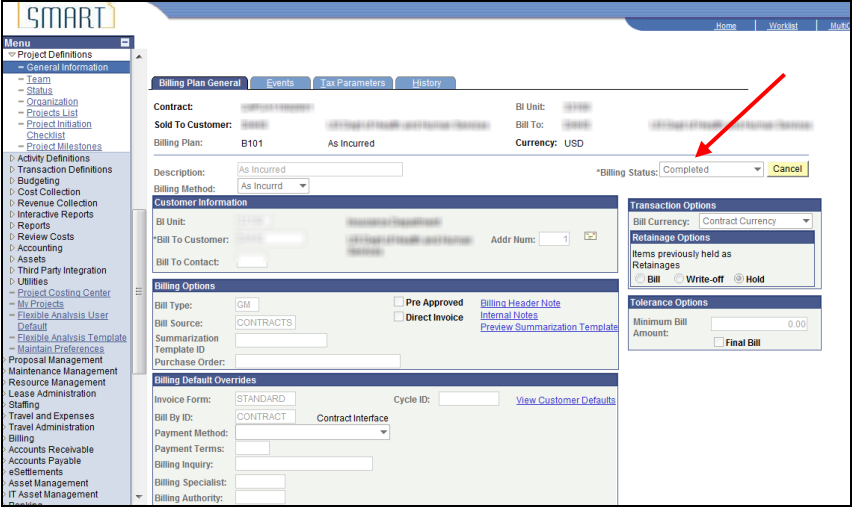
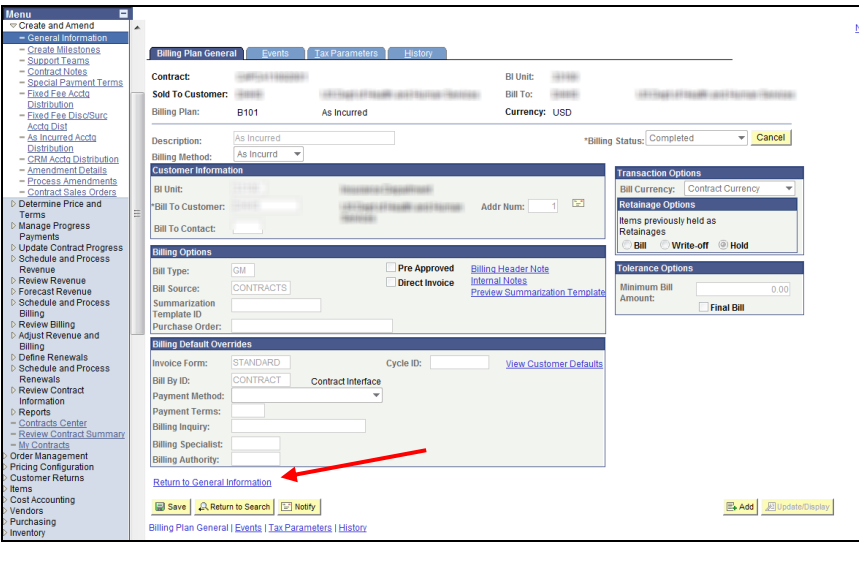


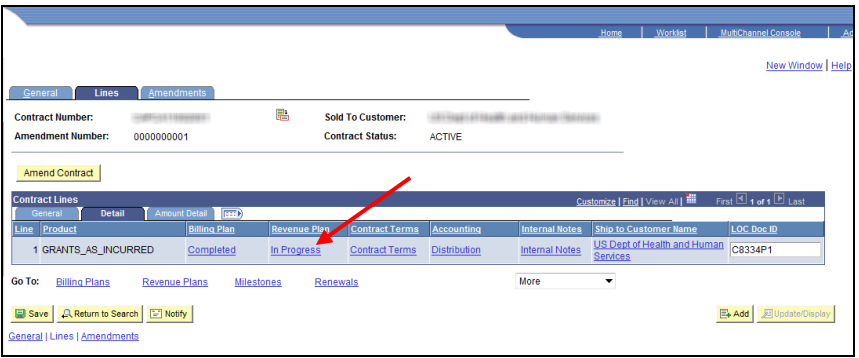
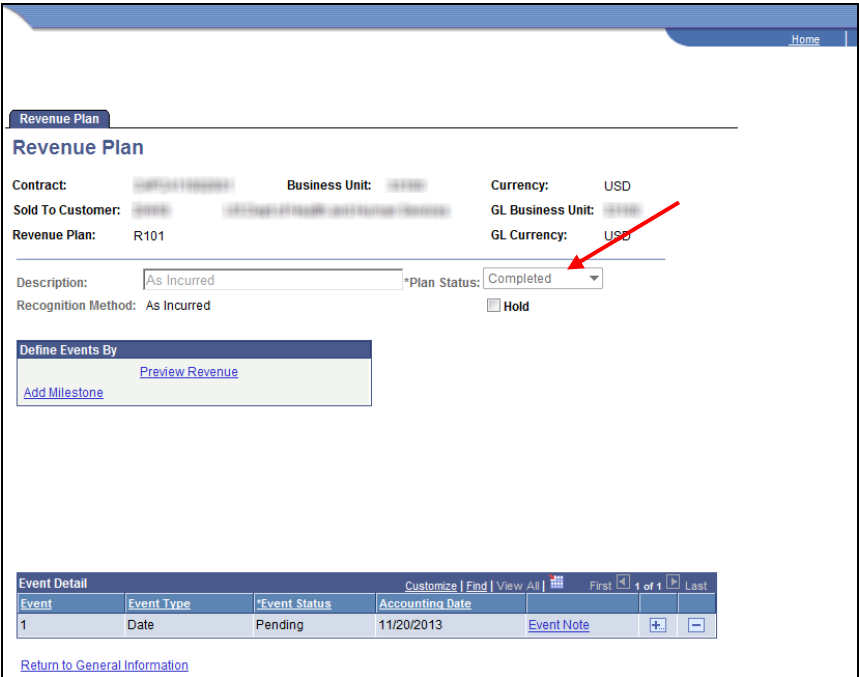
6. Click the “**Lines**” tab on the contract.

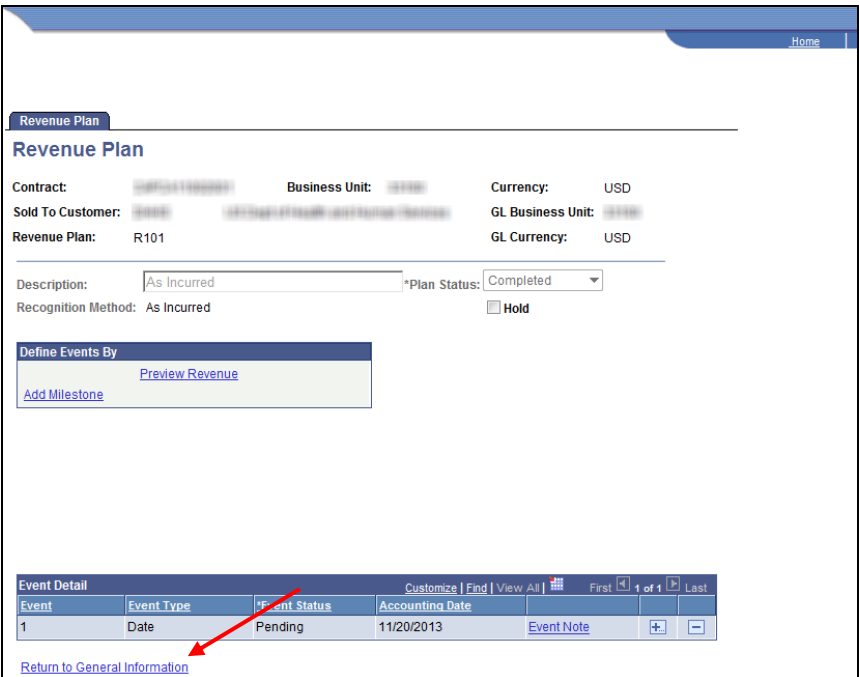
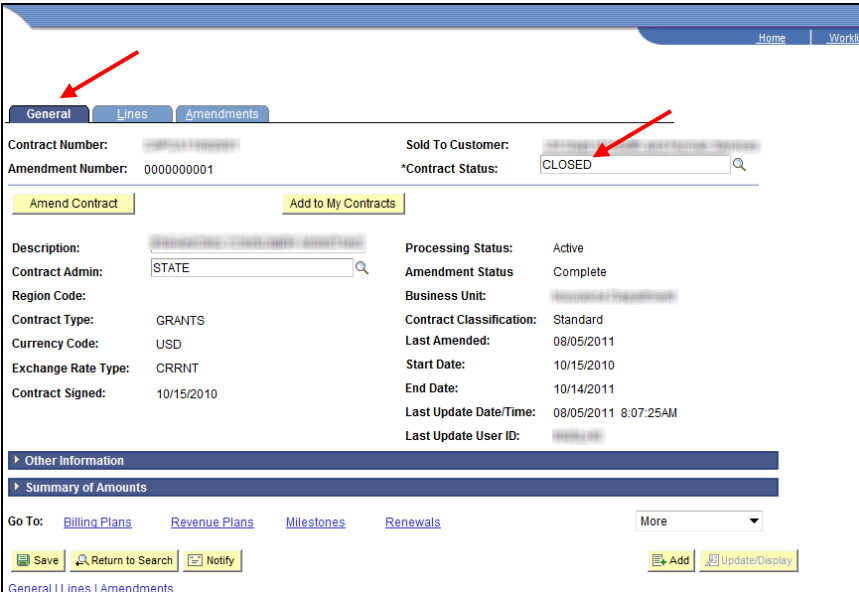
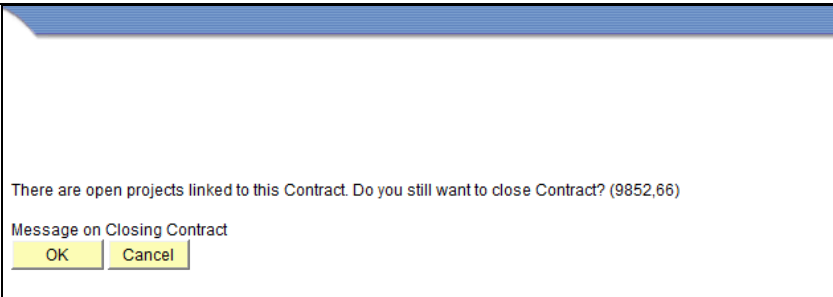


7. Click the “**Detail**” tab from the contract Lines tab.



8.	Click the <b>“Ready”</b> link underneath the <b>“Billing Plan”</b> heading.	
9.	From the <b>“Billing Plan General”</b> tab, change the <b>Billing Status</b> drop-down to <b>“Completed”</b> and click <b>Save</b> .	
10.	Click the <b>“Return to General Information”</b> link at the bottom of the page.	

11.	Click on the “ <b>Detail</b> ” tab again. Then click the “ <b>Ready</b> ” link underneath the “ <b>Revenue Plan</b> ” heading.	 <p>The screenshot shows the 'Contract Lines' page with the 'Revenue Plan' tab selected. A red arrow points to the 'Ready' link under the 'Revenue Plan' heading.</p>
12.	From the “ <b>Revenue Plan</b> ” tab, change the <b>Plan Status</b> drop-down to “ <b>Completed</b> ” and click <b>Save</b> .	 <p>The screenshot shows the 'Revenue Plan' page. The 'Plan Status' drop-down menu is set to 'Completed'. A red arrow points to the 'Save' button.</p>

13.	Click the “Return to General Information” link at the bottom of the page.	
14.	Click the contract “General” tab, then update the “Contract Status” field to “CLOSED”. Click <b>Save</b> .	
15.	You may receive a warning message that there are open projects linked to the contract. Either click “Cancel” and complete Steps 1-4 for all projects attached to the contract, or click “OK” to proceed with the contract closure.	

16. Close the Grant Award.

Navigate to: Grants > Awards > Award Profile, and search for the Award ID you want to close.

Or, as shown at right, expand the “Other Information” section on the “General” tab of the customer contract and click the “View Award Profile” link.

Home

General Lines

Contract Number: [Field] Sold To Customer: [Field]  
Amendment Number: 0000000001 \*Contract Status: CLOSED

Add to My Contracts

Description: [Field] Processing Status: Closed  
Contract Admin: STATE Amendment Status: Complete  
Region Code: [Field] Business Unit: [Field]  
Contract Type: GRANTS Contract Classification: Standard  
Currency Code: USD Last Amended: 08/05/2011  
Exchange Rate Type: CRRNT Start Date: 10/15/2010  
Contract Signed: 10/15/2010 End Date: 10/14/2011  
Last Update Date/Time: 11/20/2013 3:06:53PM  
Last Update User ID: [Field]

Other Information

☐ Template Contract  
☐ Master Contract  
☐ Legal Review Complete  
☐ Credit Check Complete  
☐ Contains Cotermination Lines

Parent Contract: [Field]  
Master Contract: [Field]  
Legal Entity: STATE  
Purchase Order: [Field]  
Proposal ID: [Field]

View Award Profile

Summary of Amounts

Go To: Billing Plans Revenue Plans Milestones Renewals More

17. On the “Award” tab, change the “Status” drop-down value to “Closed” and click **Save**.

Home

Award Funding Resources Certifications Terms Milestones Key Words Funding Inquiry

Award ID: [Field]  
Reference Award Number: [Field]

Title: [Field] Description  
Award PI: [Field] Reporting Role  
Sponsor: [Field]  
Purpose: [Field] Status: Closed  
Award Type: Grant  
Proposal ID: [Field]  
Version ID: V101  
Start Date: 10/15/2010 End Date: 10/14/2012

View Contract View Proposal Additional Information Grant Administrator Sponsor Website CFDA

Primary Project PI: Hermes,Cynthia

PC Business Unit	Project	Description
[Field]	[Field]	[Field]

Go To: Sponsor Protocols Attributes Department Credit Notepad Award Modifications

Return to Awards

Save Return to Search Previous in List Next in List Notify Refresh